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UNITED STATES DEPARTMENT OF AGRICULTURE  
Bureau of Agricultural Economics  
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THE VEGETABLE SITUATION

Summary

The unseasonal weakness in market prices of vegetables in recent weeks is attributed by the Bureau of Agricultural Economics largely to the heavy supplies marketed from the late-producing areas, together with moderate marketings of the new crop in the Southern States. Potato prices, on the other hand, have strengthened somewhat.

Further deterioration of the late potato crop during October, together with a freeze in Idaho in early November, strengthened market prices, particularly in the far western States. Prices of Idaho and Colorado varieties have risen sharply in recent weeks while those of varieties produced in the central and eastern States have advanced only slightly. The relatively low prices being received for potatoes this season together with those received last season are expected to cause potato growers to reduce acreage materially in 1939, which probably will result in higher prices and incomes to potato producers.

Market prices of vegetables in mid-November were generally lower than a year earlier. Many items were lower than in mid-October; this was particularly true of prices in eastern markets. Large increases in the acreages of snap beans and cabbage planted or to be planted in the southern States have more than offset slight decreases in the acreages of a number of other fall and winter vegetables. Total acreage of the fall and winter crops available for harvest this season is therefore expected to be about 10 percent larger than a year earlier. But the total is small relative to that grown in the country as a whole, and the prospect for the 1939 season is that both acreage

and production of all market vegetables will be slightly smaller than in 1938. This smaller supply together with improving consumer purchasing power is expected to result in some improvement in prices and incomes received by producers from vegetable production in 1939.

Because of the large supplies of canned vegetables available this year, it is probable that the production of truck crops for canning in 1939 will be decreased materially and may result in reduced incomes to producers.

The acreage planted to dry edible beans in 1939 probably will be reduced somewhat while that planted to peanuts is likely to be expanded further.

Included in this issue are summary statements on the outlook for 1939 for potatoes, sweet-potatoes, truck crops for fresh market, canning crops, watermelons, dry edible beans, and peanuts. Copies of the complete reports, by commodities, may be obtained upon request to the Bureau of Agricultural Economics, Washington, D. C.

## POTATOES

With heavy losses from rot in the Eastern Late States and from late blight in some of the North Central States, the late potato crop was reduced another 5,000,000 bushels in the November 1 estimate. The late crop is now estimated at 283,479,000 bushels (excluding the early crop in California) compared with 308,833,000 bushels produced in 1937 and 299,249,000 bushels the 1927-36 average. Freezing temperatures occurred in Idaho early in November and probably caused a reduction in yields in that area so that the total late crop may be reduced still further.

On the basis of November 1 indications, the crop in the 8 Eastern Late States totals 97,633,000 bushels or about 13 percent less than the relatively large 1937 production; in the 10 Central States 111,995,000 bushels, just slightly more than was produced last year; and in the 12 Western States (excluding California early) 73,851,000 bushels or 14 percent less than a year earlier. In all of these areas the crop is below average with the greatest differences occurring in the Eastern and Central States.

Potatoes: Shipping point and terminal market prices per 100-pound sack, specified weeks, 1937-38

Location and variety	Week ended					
	1937		1938			
	Nov. 13	Oct. 15	Oct. 22	Oct. 29	Nov. 5	Nov. 12
	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars
Shipping points:						
F.o.b. usual terms-						
Waupaca, Wis. ....	.82	.66	.66	.68	.68	.73
Presque Isle, Me. ....	.65	.81	.79	.79	.78	.80
Rochester, N. Y. ....	.89	.88	.87	-	1/.86	1/.92
Benton Harbor, Mich. ....	.90	.84	.76	.75	.76	.81
F.o.b. cash track-						
Idaho Falls, Idaho 2/ ....	.68	.68	.71	.68	.72	.90
San Luis Valley, Colo. 3/ ..	.74	.72	.90	.94	.94	1.00
Warehouse cash to growers 4/-						
Waupaca, Wis. ....	.58	.45	.46	.50	.48	.50
Presque Isle, Me. ....	.49	.70	.62	.59	.58	.61
Rochester, N. Y. ....	.80	.67	.62	.62	.63	.63
Idaho Falls, Idaho ....	.46	.45	.48	.44	.49	.66
Terminal markets:-						
New York City-						
Excluding Russet Burbanks ..	1.15	1.13	1.10	1.10	1.09	1.06
Idaho Russet Burbanks ..	1.78	2.04	1.95	1.95	1.95	2.05
Chicago-						
Excluding western stock ...	1.06	1.00	1.09	1.10	1.08	1.18
Idaho Russet Burbanks .....	1.39	1.45	1.57	1.49	1.50	1.69
Colo. Red McClures .....	1.43	1.43	1.68	1.75	1.71	1.81

1/ Average for 1 day.

3/ Red McClures.

2/ Russet Burbanks.

4/ Bulk per cwt.



The distribution of the late crop this season is such that a larger than usual proportion of the crop will be moved by motor truck. Both the areas, the Eastern and Western States, that usually contribute to a large rail movement have small crops relative to last year, while the Central States have a slightly larger crop. To November 19, 1938, only 45,600 cars have been shipped by rail from the Late States, compared with 55,150 cars to a comparable date last year. In recent weeks slightly less than 3,000 cars per week have been moving by rail against 3,500 a year earlier.

Potato prices have advanced rather sharply in western markets during the past several weeks, but remained fairly stable in the East. The advance at Chicago and in the shipping areas of Idaho and Colorado has been due in part to the freeze which occurred in Idaho early in November, and in part to the general deterioration in the crop in the Central States. Prices of Idaho potatoes at Chicago rose from \$1.45 per 100 pounds in mid-October to \$1.69 in mid-November and of Red McClures from \$1.43 to \$1.81 during the same period.

#### TRUCK CROPS

The average of 13 fall and winter truck crops for fresh market shipment planted or to be planted for the 1939 season is indicated to be about 10 percent larger than the acreage harvested in the 1938 season and about 29 percent larger than the 10-year average <sup>acreage</sup> for 1928-37. Increases in snap beans, cabbage, eggplant, lettuce, and green peppers, were partly offset by decreases in carrots, cauliflower, celery, cucumbers, kale, onions, and tomatoes, while the fall acreage of spinach showed no change from a year earlier. Snap beans, and early cabbage show the greatest increases and largely account for the total expansion. Total acreage of the winter crops, however, is small relative to that for the country as a whole, but it has been expanding rapidly in the last decade and provides an increasing supply of fresh vegetables in a period of the year when practically none were available in earlier years.

From the standpoint of production, early indications point to larger fall and winter crops of snap beans, cucumbers, eggplant and green peppers and smaller crops of each of the others except cabbage, onions and lettuce for which no production indications are yet available.

With the exception of the first 2 weeks in November, the carlot movement of truck crops has totaled about 4,500 cars per week, with shipments of green beans, cabbage, carrots, celery, lettuce, mixed vegetables, onions, spinach, sweetpotatoes, and tomatoes being the more important. The movement of the new season crops produced in the Southern States and California is getting well under way and in many instances is displacing the late crops produced in the Northern States.

Although there was a tendency a month ago for market prices of truck crops in general to strengthen, prices during recent weeks have weakened perceptibly. At New York City prices of most truck crops in mid-November were lower than both a month and a year earlier. Prices of lima beans, green peppers, sweetpotatoes and tomatoes were about the only ones higher than in mid-October, while prices of lima beans, carrots, lettuce, spinach and sweetpotatoes were the only ones higher than in mid-November last year.

Chicago wholesale prices of truck crops in mid-November were generally below those of a year earlier; only those of carrots, celery, lettuce, green peas, sweetpotatoes and tomatoes were higher. As compared with mid-October, however, the number of items that were lower in price was offset by almost an equal number that were higher.

The combined index of truck crop prices usually rises during this period of the year, reaching a seasonal peak in March, as the source of supplies shift to storage supplies and the production in the Southern and Far Western States. The weakness in prices this season, therefore, is a contra-seasonal situation and may be attributed largely to the unusually heavy supplies being marketed from the late 1938 production and the new 1939 crops.

Truck crops: Wholesale prices at New York, for specified weeks, 1937-38

Commodity	Unit	Week ended					
		1937			1938		
		Nov. 13	Oct. 15	Oct. 22	Oct. 29	Nov. 5	Nov. 12
Asparagus, medium .....	Crate	4.22	---	4.32	3.54	3.50	3.59
Beans, lima, Calif. ....	35-lb. : : crate	3.58	3.15	3.06	3.92	3.33	4.12
Beans, snap, green, Fla. ....	Bu.	2.11	1 1/2 2.38	1.60	1.35	1.34	1.44
" " wax .....	"	3.12	2.20	2.19	2.30	2.10	---
" " " Fla. ....	"	3.21	---	---	---	2.25	2.19
Beets, topped .....	"	.40	.46	.48	.45	.38	.38
Broccoli, eastern .....	Crate	1.18	1.52	1.05	.85	.82	.85
" , western .....	"	2.10	2.92	2.23	1.69	1.65	1.81
Cabbage, Danish, N.Y.* ...	100-lb.	1.02	.70	.60	.64	.58	.64
Carrots, Calif. ....	lettuce : : crate	2.50	3.92	3.33	3.12	3.02	3.31
" N.Y. topped 2/ ....	Bu.	.66	.78	.75	.77	.76	.75
Cauliflower, eastern .....	Crate	.93	1.54	.73	.54	.54	.58
Celery, eastern .....	2/3 "	2.09	1.41	1.27	1.32	1.28	1.44
" , western .....	1/2 "	2.15	---	2.81	2.53	2.45	2.42
Cucumbers, southern, fancy :							
grade .....	Bu.	2.98	3.85	2.67	2.25	2.21	2.56
Eggplant, Fla. fancy .....	Crate	3.40	3.10	2.94	2.15	2.02	2.03
Lettuce, western, iceberg....	4-5 doz. : : crate	2.45	4.00	4.10	3.73	3.08	2.88
Lettuce, Big Boston .....	2-doz. : : crate	.62	1.33	1.22	1.18	1.00	1.08
Onions, yellow .....	50-lb. : : sack	1.18	.91	.89	.94	.93	.92
Onions, Sweet Spanish .....	"	1.30	1.25	1.22	1.25	1.25	1.18
Peas, green, western 3/ ....	Bu.	2.50	2.51	2.62	2.85	2.46	2.39
Peppers, Fla. ....	Crate	3.06	---	1.62	1.80	1.75	2.03
" Calif. ....	"	3.04	1.75	1.56	2.02	1.52	1.78
Spinach .....	Bu.	.48	1.40	.87	.83	.60	.67
Sweetpotatoes .....	"	.75	1.02	.98	1.04	1.15	1.19
Tomatoes, Calif. ....	Lug box	2.08	1.60	1.73	1.92	1.97	1.75
Tomatoes, Fla. ....	" "	3.15	---	---	1.75	2.02	1.95
Turnips, topped .....	Bu.	.42	.49	.41	.38	.37	.38

\* - Note correction on October report as follows: October 1, \$.32; October 8, \$.68; October 15, \$.70.      1/ Average for 1 day.      2/ Excludes nearby.  
3/ Excludes pole peas.

Truck crops: Wholesale prices at Chicago, averages for  
specified weeks, 1937-38

Commodity	Unit	Week ended					
		1937	1938				
		Nov. 13	Oct. 15	Oct. 22	Oct. 29	Nov. 5	Nov. 12
		Dollars	Dollars	Dollars	Dollars	Dollars	Dollars
Asparagus, Calif., med.	crate	3.98	4.17	4.62	3.46	3.37	3.31
Beans, lima .....	35-lb. crate	3.69	---	2.83	3.50	3.44	3.28
Beans, snap green, Fla.	bushel	2.42	---	---	---	1.21	1.53
" " " .....	"	2.08	1.62	1.81	1.35	1.22	1.28
" " wax .....	"	2.00	1.53	1.91	1.46	1.41	1/1.12
Beets, topped .....	"	.40	.30	.28	.29	.28	.29
Broccoli, western .....	pony crate	1.96	2.54	1.97	1.56	1.36	1.66
Cabbage, Danish .....	100 pounds	1.48	.70	.76	.76	.72	.84
Carrots, Calif. ....	western crt	2.35	4.02	3.02	2.75	2.58	2.87
" topped, Ill. .:	bushel	.38	.32	.29	.30	.30	.32
Cauliflower, western ..	pony crate	1.15	1.31	.92	.86	.85	---
" Mich. ....	crate	1.22	1.22	.95	.96	1.05	1/1.06
Celery, Mich. 1/ .....	square crt.	.48	.42	.42	.46	.40	.52
" western .....	1/2 crate	1.96	1.31	1.97	2.12	1.83	1.98
Cucumbers, La. ....	bushel	2.58	3.02	1.84	1.52	1.87	1/1.89
" Fla. ....	"	3.59	---	---	2.02	2.50	2.59
Eggplant, La. ....	"	---	2/1.62	1.91	2/2.00	2.06	2/2.00
" Fla. ....	1 1/2 bush. crt.	4.10	---	---	---	3.19	2.21
Lettuce, Iceberg .....	4-5 doz. crt.	2.02	3.19	3.32	3.04	2.60	2.72
Onions, yellow 3/ .....	50-lb. sack	.88	---	.69	.74	.73	.70
" sweet Spanish .:	"	1.04	.34	.91	.93	.91	.92
Peas, Calif. ....	bushel	2.50	2.86	3.05	3.00	2.88	2/3.00
Peppers, Calif. & Tex. :	1 1/2 bush. crt.	2.44	1.66	1.71	1.64	1.51	1.85
Spinach .....	bushel	.54	.64	.47	.47	.44	.54
" , Wash. ....	20-lb. crate	1.33	1.22	.92	.93	.88	.94
Sweetpotatoes .....	bushel	1.10	1.16	1.14	1.11	1.12	1.41
Tomatoes .....	lug box	1/1.56	1.60	1.88	1.82	1.68	2.08
Turnips, topped .....	bushel	.78	.30	.32	.34	.34	.32

1/ Generally fair quality and condition.

2/ Average for 1 day.

3/ Includes "street sales".



Truck crops and potatoes: Car-lot (rail or boat) shipments from  
originating points in the United States, for the week ended  
November 19, 1938 with comparisons

Item	Week ended						
	: 1937	:	1938				
	: Nov. 20:	Oct. 15:	Oct. 22:	Oct. 29:	Nov. 5:	Nov. 12:	Nov. 19
	: Cars	Cars	Cars	Cars	Cars	Cars	Cars
Asparagus.....	3	8	7	8	5	3	2
Beans, snap and lima.....	236	57	211	303	287	193	368
Beets.....	27	83	116	98	5	14	41
Cabbage.....	547	683	588	573	474	388	444
Cantaloupes.....	0	10	0	0	0	0	0
Carrots.....	237	181	191	206	150	214	203
Casaba melons.....	2	12	15	15	3	3	0
Cauliflower.....	379	78	150	140	130	189	67
Celery.....	548	318	311	349	347	633	706
Cucumbers.....	28	53	66	40	29	50	36
Egg plant.....	2	1	2	3	1	7	5
Greens, except spinach..	111	63	59	80	99	79	50
Honey Dew melons.....	14	19	24	11	9	25	10
Lettuce.....	1,051	756	872	985	887	878	917
Mixed melons.....	0	12	10	8	3	1	0
Mixed vegetables.....	391	307	265	254	236	324	334
Onions.....	505	618	557	638	533	510	581
Peas, green.....	132	92	80	83	79	74	29
Peppers.....	71	26	34	39	34	83	84
Spinach.....	133	46	22	36	15	54	106
Sweetpotatoes.....	496	610	345	274	224	244	417
Tomatoes.....	141	516	494	405	314	294	190
Turnips & rutabagas.....	10	25	22	25	23	17	10
Total truck crops. ....	5,064	4,574	4,441	4,573	3,887	4,277	4,600
Potatoes, total.....	3,515	3,278	3,317	3,746	2,792	3,074	2,979
Early.....	0	7	0	0	1	0	1
Intermediate.....	54	149	217	126	65	65	24
Late.....	3,461	3,122	3,100	3,620	2,726	3,027	2,954
Grand total, all vegetables.....	8,579	7,852	7,758	8,319	6,679	7,369	7,579

In the case of many commodities, car-lot shipments decrease as the source of supply shifts to those producing areas where the motor truck is the principal means of transportation; available market supplies, therefore, are frequently larger than indicated by this car-lot shipment report.

Truck crops: Commercial acreage and production for market, average 1928-37, annual 1938 and indicated 1939 as reported up to November 15

Commodity and group	Acreage			Production			
	10-year			10-year			
	average	1938	1939	Unit	average	1938	1939
	1928-37				1928-37		
Asparagus 1/	Acres	Acres	Acres	:1,000 :			
Calif. ....	66,440	71,510	77,900	crates:2/	6,825	5,626	-
S.C. & Ga. ....	12,660	10,100	9,500	" :2/	431	410	-
Total Early ....	79,100	81,610	87,400	" :2/	7,256	6,036	-
Late .....	25,900	31,790	35,880	" :2/	2,222	3,720	-
All States ....	105,000	113,400	123,280	" :2/	9,478	9,756	
Snap beans :				:1,000 :			
Fall .....	14,980	15,000	21,000	bush. :	1,313	1,475	2,280
All States ....	135,720	174,450	-	" :	11,293	14,608	-
Cabbage 1/ :				:			
Fall .....	1,250	2,100	1,900	Tons :2/	6,500	13,600	-
Early .....	26,530	46,100	60,000	" :2/	219,500	237,400	-
All States ....	165,610	184,190	-	" :2/	1,082,200	1,500,000	-
Carrots 1/ :				:1,000 :			
Fall .....	5,200	8,750	8,600	bush. :	2,583	4,375	4,128
All States ....	31,900	41,750	-	" :	11,496	14,859	-
Cauliflower :				:1,000 :			
Fall & Winter ..	9,070	8,200	7,900	crates:	2,368	2,587	2,119
All States ....	28,460	28,280	-	" :	6,993	7,776	-
Celery :				:			
Fall & Winter ..	7,270	9,750	9,250	" :	1,282	2,048	1,758
All States ....	33,810	42,650	-	" :	9,126	12,020	-
Cucumbers :				:1,000 :			
Fall .....	1,550	2,000	1,800	bush. :	115	109	108
All States ....	44,980	44,160	-	" :	4,153	4,605	-
Eggplant :				:			
Fall .....	1,220	1,450	1,500	" :	191	195	270
All States ....	3,590	4,270	-	" :	804	916	-
Kale :				:			
Va. ....	1,780	1,050	700	" :	619	514	280
Lettuce :				:1,000 :			
Early .....	44,190	37,000	38,000	crates:2/	5,428	4,776	-
All States ....	154,380	148,570	-	" :2/	19,183	18,319	-
Onions :				:1,000 :			
Early .....	24,620	27,450	27,260	sacks :2/	2,170	2,159	-
All States ....	88,870	93,290	-	" :2/	13,638	14,740	-
Green peppers :				:1,000 :			
Fall .....	2,340	3,800	4,400	bu. :	427	473	550
All States ....	17,480	21,120	-	" :	3,960	4,636	-
Spinach :				:			
Fall .....	2,700	2,700	2,700	" :	747	972	878
All States ....	57,230	65,850	-	" :	12,465	12,548	
Tomatoes :				:			
Fall .....	5,700	9,000	6,700	" :	346	350	297
All States ....	169,380	223,270	-	" :	18,729	25,529	
Total Fall & Early crops 3/	148,400	174,350	191,710	" :			

1/ Includes undetermined quantities of production used for manufacture, frozen pack, etc.

2/ Average 1927-36.

3/ Excluding asparagus.

## OUTLOOK FOR 1939

The following are summary statements taken from the 1939 annual outlook reports for potatoes, sweetpotatoes, truck crops, dry edible beans, and peanuts.

Potatoes

The acreage planted to potatoes in 1939 is expected to be less than in 1938. With average yields on this smaller acreage, production of potatoes in 1939 would total about 310,000,000 bushels. A crop of this size would be nearly 58,000,000 bushels less than is estimated for 1938 (November 1) and about 60,000,000 bushels less than the 10-year 1927-36 average. Should yields equal about 124 bushels per acre - the average of the past two seasons, 1937 and 1938 - the 1939 crop would approximate 350,000,000 bushels, but with yields as low as in 1933 the crop would total only about 280,000,000 bushels.

It is probable that the greatest reduction in the acreage planted in 1939 will occur in the late States although it is indicated that all areas will show some decrease from the 1938 plantings. These reductions are expected to result from the relatively low prices that producers are receiving for the 1938 crop and the low prices received for the 1937 crop.

If present prospects for a smaller production of potatoes and improved consumer purchasing power in 1939 materialize, both prices and income received by growers for the United States as a whole from potatoes should be materially higher than in other recent years.

Sweetpotatoes

The acreage of sweetpotatoes in 1939 is expected to be about the same as the 1938 harvested acreage -- 891,000 acres. With average yields, this would indicate a crop of about 77 million bushels, or about the same as the 1938<sup>estimated</sup> production (November 1) and 2,000,000 bushels more than the 10-year 1927-36 average crop. Because of the relatively low prices being received for the 1938 crop in the eastern market area, the acreage in this area in 1939 probably will be reduced slightly. This reduction, however, may be offset by increases in Louisiana and some other commercial producing States. Not much change in the acreage planted in the Cotton Belt is expected in 1939.

Truck Crops for Market

The relatively low prices received by growers of important truck crops for fresh market shipment in 1938 will probably result in a slight reduction of the total acreage and production in the United States for 1939. If production is reduced somewhat and consumer purchasing power improves as much as is now in prospect, prices and incomes received by producers of these truck crops as a class will be somewhat higher in 1939 than they were in 1938.

In 1938 the acreage and production of truck crops for market continued to expand and exceeded all previous records. Although the expansion of acreage for harvest of all truck crops combined was small, a relatively sharp increase in the yield per acre had the result of raising the total volume



of production by about 5 percent. This large supply, during a period of relatively low consumer purchasing power, resulted in sharply lower prices to growers.

The discouraging price situation in 1938 will probably result in some curtailment of production in 1939. For the country as a whole smaller acreages of lima beans, beets, cabbage, celery, cucumbers, onions, and tomatoes are expected in 1939. On the other hand, some increase in the acreage of asparagus, snap beans, cantaloups, cauliflower, lettuce, spinach, and watermelons is expected for the 1939 season.

Total exports of a wide variety of truck crops, during 1938, are expected to exceed last year's shipments. The export market for fresh vegetables, although a relatively small outlet for total domestic truck crop production, has been increasing steadily in recent years. The bulk of the export trade is with Canada and the revival of trade with that country has been assisted by the reduction of import duty charges and increased Canadian consumption.

Imports of Cuban and Mexican winter vegetables in 1938-39 are expected to be below last years shipments. Cuban plantings of tomatoes, which are the chief item in winter vegetable trade, are expected to be 20 percent less than last year although some increase in the early crop of tomatoes may occur. Acreage estimates for other crops are as follows: lima beans, about the same as last year; peppers, about 25 to 50 percent less; eggplant, about 30 percent less; and cucumbers, about 15 percent less.

While early plantings are not necessarily indicative of the acreage ultimately set out to Mexican winter vegetables, comparison of planting for the first week of October this year, as against the same period last year show a sharp reduction. Due to lack of capital and to certain agrarian problems, it is expected that total winter vegetable acreage may be roughly 30 percent below last year.

Indexes of 17 vegetables for fresh market, 1919-38  
(1924-29 = 100)

Year	Acreage	Yield	Value per acre	Production	Price	Value
1919	49.2	107.5	129.1	52.9	119.5	63.9
1920	58.1	115.1	116.6	66.9	102.8	68.2
1921	58.5	104.1	118.5	60.9	114.0	69.7
1922	74.6	100.7	106.2	75.1	107.9	79.7
1923	68.9	103.2	131.1	71.1	124.8	90.9
1924	83.5	102.8	107.8	85.8	104.5	90.6
1925	88.2	104.2	110.8	91.9	106.1	98.2
1926	96.8	98.3	95.0	95.2	97.6	92.5
1927	102.5	102.5	93.3	105.1	92.1	96.2
1928	110.7	94.2	98.0	104.3	103.7	109.2
1929	118.4	99.4	95.2	117.7	96.0	113.3
1930	131.9	91.9	78.5	121.2	87.1	104.1
1931	136.2	87.7	64.4	119.5	73.8	88.2
1932	139.6	88.2	52.2	123.1	61.3	73.4
1933	130.6	85.8	54.4	112.0	65.2	71.5
1934	149.0	85.6	54.9	127.6	66.4	82.3
1935	147.1	84.9	60.5	124.9	72.0	89.5
1936	152.1	86.8	64.2	132.0	75.9	98.4
1937	151.5	89.2	69.0	135.2	77.2	105.4
1938 1/	152.6	92.6		141.3		

1/ Preliminary.



Snap Beans For Market

Notwithstanding the lower prices received by growers in 1938 than in 1937- which resulted in part from a very large production of snap beans in 1938 and in part to lower consumer purchasing power-it is expected that the acreage of snap beans for the 1939 season will be increased slightly in all groups of producing States except possibly in the early, second early and second section of late States. The sharp upward trend in both acreage and production which is evident in all areas is expected to more than offset the effect of low prices received for the 1938 crop except in the areas indicated. In view of the prospects that consumer purchasing power in 1939 will be somewhat higher than in 1938, the increases in snap bean acreages probably will not result in any further declines in prices.

Cabbage For Market

In the past, producers have tended to reduce the acreage planted to cabbage in years following a season of relatively low prices and to increase the acreage following a season of relatively high prices. On this basis it is indicated that plantings in 1939 may be decreased rather sharply in practically all areas except the early and intermediate States. Although prices received for the fall crop in 1938 were slightly higher than in 1937, they do not appear to be high enough to stimulate acreage expansion in 1939 and a moderate decrease from that planted in 1937 is in prospect. Early reports indicate that the fall acreage has been decreased slightly from the acreage planted a year earlier. But an increase of 30 percent is indicated for the early States.

Based upon average yields per acre, the smaller acreages in nearly all areas would result in a sharp reduction in cabbage supplies throughout most of 1939. The reduction in production would be even greater than the change in acreage, as yields in 1938 were unusually high. Thus the decrease in production is likely to be more than seems necessary in view of the prospects of improved demand conditions in 1939. Because of the large production of cabbage for kraut in 1938 and the prospect that some of the canned kraut will be carried over into the 1939 kraut-marketing season, it is probable that the production of cabbage for kraut will be decreased in 1939.

Celery

Celery production in 1939, based on the anticipated acreage, will be less than that of 1938, by 5 to 10 percent. Consumer incomes in 1939 are expected to be moderately higher than during 1938. Both of these factors point to higher prices and net incomes for celery growers in 1939. However, even if such improvements should materialize only those growers with average production costs or less can expect a reasonable profit.

The principal difficulties of the industry are in the early areas where both yield and prices have declined. Indications at present point to curtailment of acreage in these areas for 1939. Yet certain factors may prevent any notable decline in acreage. Many growers have the equipment, land, and experience for growing celery. They cannot easily change to other crops, and so long as

there is any profit left, gain nothing individually by reducing acreage. Also shippers and receivers make their profits in volume handled, have heavy investments in plant and equipment, and will in some cases grow the celery themselves if it appears that regular growers are abandoning the enterprise.

### Onions

Because of the relatively low prices received by growers for the 1938 crop, it seems probable that there will be a small decrease in the United States acreage planted to commercial onions in 1939 compared with the acreage planted in 1938. A decrease of about 5 percent is in prospect for the early group of States producing Bermuda and Creole types. Unless prices show marked improvement during the fall and winter months over those received at about harvest time, a similar acreage reduction is in prospect for the late States. No appreciable change is expected in the area to be planted in the intermediate group of onion-producing States.

### Tomatoes For Market

Prospects for the United States as a whole indicate a decrease in plantings and production of tomatoes for the fresh market in 1939. The declines in the acreage planted are expected in those areas where prices in 1938 were drastically below those in 1937. The acreage planted in 1939 will probably be reduced below that harvested in 1938 in the second section of the Early States and in the Second Early group. In the Early (1), Intermediate, and Late States no change of any considerable magnitude is expected in the acreage planted next year as compared with 1938. An increase in acreage probably will occur in the fall group of States in view of the relatively high prices received in 1938.

### Watermelons

For the country as a whole, the production of watermelons in 1939 is expected to be somewhat larger than the medium sized crop of 1938. This prospect can be realized with no increase in acreage, provided an average yield is obtained from an area equal to that planted this season. With normal weather conditions in consuming markets and improvement in consumer income, prices per unit to growers should at least equal those of 1938 and total returns should be greater.

### Canning Crops

The combined tonnage of all vegetables for processing in 1938 is indicated to be 10 to 15 percent smaller than the large 1937 production and probably will result in a total pack of important canned vegetables about 10 percent less than the record 1937 pack. Liberal carry-overs from the 1937-38 season are indicated for many of these products, however, and probably will provide a total supply only slightly below the record large supply available in 1937-38 and considerably above average annual disappearance.



In view of the present importance of large supplies, the wholesale prices of such items as green peas, snap beans, and sweet corn are now at relatively low levels. Wholesale prices of canned tomatoes are on about the same average level as prevailed during 1937-38. If canners follow their past practices it may be expected that they will contract for their 1939 acreage at prices in line with those prevailing for the canned product during the 2-month period of December and January.

With prospective supplies at the beginning of the 1938-39 season substantially in excess of average consumption, it seems probable that the total carry-over of processed vegetables at the beginning of the 1939-40 season will be larger than average and unless there is a substantial reduction in the 1939 plantings of practically all the important canning crops except tomatoes total supplies of canned vegetables available for the 1939-40 marketing season will also be large. Reductions of about 25 percent in the 1939 plantings of snap beans, about 35 percent for green peas, and 5 to 11 percent in the plantings of sweet corn would provide under average growing conditions, sufficient quantities for normal requirements and leave a carry-over at the end of the 1939-40 season that would not be burdensome.

The acreage planted in 1938 to 11 important truck crops for manufacture was about 15 percent below the 1937 plantings, with the acreage of sweet corn, cucumbers for pickles, and tomatoes for manufacture showing the greatest reductions. Indications on October 1 pointed to total production of the 11 canning crops being only 10 to 15 percent smaller than the large production recorded for 1937. But while some reduction in packs is indicated, the heavy carry-overs at the end of the 1937-38 season are supplying canners with above-average quantities for distribution during the 1938-39 season.

The 1938 production of green peas for manufacture estimated to total 298,990 tons is a record tonnage and is the second successive season of heavy production. A record large total supply (pack plus carry-over) in excess of 32 million cases is confronting canners, and probably will result in an excessive carry-over at the end of the 1938-39 marketing season. A large carry-over of green peas at the beginning of the 1939-40 season appears to be probable in spite of the present low prices for the canned product. Likewise, a record 1938 production of snap beans for manufacture, together with a carry-over of 500,000 cases at the end of the 1937-38 season, indicates that a reduction in plantings for 1939 will be necessary.

On the other hand, canners reduced their 1938 plantings of sweet corn and tomatoes for manufacture in an effort to adjust the supplies of these two crops to probable needs. Although a reduction of about 25 percent from the 1937 acreage of sweet corn was made in plantings for 1938, above-average yields have produced a pack of about 19,500,000 cases, or only 4 million cases below the 1937 pack. Added to the pack for 1938-39, however, is a carry-over of canned corn of 4,650,000 cases which resulted in a total supply about as large as in 1937-38. Therefore, a further reduction in the acreage of sweet corn for canning is in prospect for 1939. Plantings of tomatoes in 1938 were 17 percent less than in 1937. Rainy weather in the Ohio Valley and other important eastern areas further curtailed the production, and the 1938 pack of canned tomatoes may not be

in excess of 20 million cases. This pack is 18 percent below the 1937 pack, and 10 percent below the 10-year (1927-36) average pack. Since the total supply consisting of a carry-over of 3,200,000 cases and a pack estimated at 20 million cases is less than average, some upward adjustment of acreage may be made for the 1939-40 season. On the basis of average yields, an increase of 20 percent in plantings appears to be needed.

A record high production of lima beans and beets for canning is indicated for 1938. Increased demand for lima beans for freezing has resulted in the expansion in the acreage planted to this crop, especially in New Jersey, Delaware, and Virginia. Of the other minor truck crops, production of pimentos for manufacture has increased in 1938 over 1937, particularly in Georgia. Acreages devoted to the production of asparagus in California, cabbage for sauerkraut, and spinach for manufacture have been reduced slightly from the 1937 acreages.

Principal canned vegetables: General statistics, average 1929-33  
and annual 1934-35 to 1938-39

Year	: Carry-over:	: Pack	: Imports	: Total	: Exports	: Apparent
	: 1/	: 2/	: 3/	: supply:	: and ship-	: domestic
					: ments 4/	: disappearance
	1,000 cases - No. 2 basis					
Average						
1929-33	: 12,799	74,352	3,287	90,438	1,048	77,685
1934-35	: 4,462	75,253	2,570	82,285	952	77,888
1935-36	: 3,445	106,339	2,393	112,177	1,064	102,980
1936-37	: 8,133	94,680	2,057	104,870	967	97,227
1937-38	: 6,676	114,966	2,032	123,674	1,006	106,207
1938-39	: 5/ 16,461	5/103,500				

1/ Asparagus, snap beans, beets, sweet corn, green peas, tomatoes, spinach,

2/ Same items as in carry-over, plus beets, pumpkins and squash, tomato pulp and juice.

3/ Tomatoes: These usually account for over 90 percent of total.

4/ Asparagus, sweet corn, peas, tomatoes. 1937-38 shipments estimated as same as 1936-37.

5/ Preliminary.

### Dry Edible Beans

The 1938-39 United States supply of beans is indicated to be slightly larger than last year and about one-fourth larger than the average for the 5-year period, 1932-36. Although 1938 production is estimated to be approximately 6 percent less than the record large crop of 1937, carry-over stocks of beans at the beginning of the 1938-39 season are the largest on record.

Because of the relatively low prices resulting from the large supplies of 1937 and 1938 and reduced consumer incomes, it is probable that the acreage planted to beans in 1939, particularly Pea beans, will be reduced materially.



A total United States harvested acreage in 1939 about the same as that available for harvest in 1938, with a yield equal to the average for the last 5 years, would produce approximately 13 million bags (100 pounds)--a crop about 15 percent smaller than the average for the two preceding seasons but about 7 percent larger than the average for the 5 years, 1932-36. Such a crop, together with a probable carry-over from the 1938-39 season approximately the same as that of a year earlier, would provide a supply of beans about 2 million bags in excess of usual disappearance. But if acreage is reduced in 1939 as expected, if yields are average, and if consumer incomes increase to higher levels, bean prices in the 1939-40 season probably will be higher than in either of the two preceding seasons.

### Peanuts

With relatively favorable returns in prospect from peanuts in 1938 there will be a tendency for growers to increase the acreage to be harvested for nuts in 1939.

Current prices of peanuts, largely resulting from the diversion program of the Agricultural Adjustment Administration, will probably yield relatively favorable returns this year compared with those from cotton and other competing crops.

Unless yields in 1939 are below average the quantity available for sale from the 1939 crop will be in excess of the quantity of edible peanuts that the trade can absorb at around current prices. Thus the market situation in the 1939-40 peanut-marketing season will again depend to an appreciable extent on peanut-oil prices which are influenced by supplies and by prices of cottonseed oil and lard. The combined supply of cottonseed oil and lard in 1939-40 is expected to be smaller than in 1938-39 chiefly because of prospective reductions in the stocks of cottonseed oil. These smaller supplies together with improved demand conditions will probably result in an increased outlet for peanut oil in 1939-40.

